DOCUMENT RESUME

ED 308 868 IR 052 820

AUTHOR	Arthur, Gwen; And Others
TITLE	Library-Wide Staff Orientation and Public Services Training. Report of the Task Force.
INSTITUTION	Temple Univ., Philadelphia, Pa. Univ. Libraries.
PUB DATE	9 Mar 88
NOTE	75p.
PUB TYPE	Viewpoints (120) -- Reports - Descriptive (141)
EDRS PRICE	MF01/PC03 Plus Postage.
DESCRIPTORS	Academic Libraries; *Higher Education; *Library Personnel; *Library Planning; Library Services; *Staff Development; *Staff Orientation; *Training Methods
IDENTIFIERS	*Public Services

ABSTRACT

This report proposes a program for orientation and training for public services staff at the Temple University Libraries. In the first section, orientation and training needs are assessed. Goals and an overview of the program are outlined in the next section. The third section describes the five program elements and objectives: (1) an individual library tour; (2) a central library system services manual; (3) a set of exercises; (4) a library skills workbook; and (5) a schedule of six orientation and staff development sessions covering library organization, public services, interpersonal and communication skills, the online catalog, and the card catalog and indexes. The fourth section suggests a three-tiered approach to this program based on the different needs of non-public service, public service, and full-service reference personnel. Participation of branch library staff is recommended in the fifth section. The sixth section presents a proposal for program implementation and maintenance. The need for administrative and financial support is emphasized in the final section. Appendixes include related memos; an excerpt from a 1984 report on staffing and management; the orientation tour checklist; a set of exercises; descriptions of public service videotapes; and a staff questionnaire. (MES)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED308868

IR

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

X This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

REPORT OF THE TASK FORCE

ON

LIBRARY-WIDE STAFF ORIENTATION AND PUBLIC SERVICES TRAINING

Gwen Arthur, Chair
Karen Dyson
Beth Jacoby
Garrett Marsh
Carleton Schwager
David Weinberg
Joe Zucca

March 9, 1988

IR052820

BEST COPY AVAILABLE

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

James N. Myers

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

TABLE OF CONTENTS

Introduction.....1

Orientation and Training Needs.....2

The Orientation and Training Program Proposal.....3-4

- Goals.....3
- Overview.....4

Program Elements.....5-11

- The Paley Tour Checklist.....5
- The CLS Services Manual.....6
- The Self-Guided Tour and Exercises.....7
- The Library Skills Workbook.....8
- Staff Development Sessions.....9-11

The Three-Tiered Program.....12-14

Branch Library Staff.....15

Proposal for Implementation and Maintenance.....15-17

Administrative and Financial Support.....18

Appendices

A. Director's Charge to the Task Force
B. Report of the Task Force on Staffing and Management, April 1984 (excerpt)
C. Paley Tour Checklist
D. Self-Guided Tour and Exercises
E. ALA Video Flyer
F. Task Force on Public Service Desk Training (questionnaire)

INTRODUCTION

The following plan by the Library-wide Staff Orientation and Public Services Training Task Force was prepared over the five-month period from October 1987 to March 1988. In response to a proposal raised and approved in the Administrative Council, the Director originally charged the task force "to develop plans for a Library-wide desk training program" and later elaborated on this to encompass "a three-level program--an orientation component for all CLS staff, a second component for staff who regularly work at any public service point, and a third component of in-depth training for those who staff full-service reference desks." To prepare this proposal the Task Force, representing library personnel from throughout the Central Library System, has solicited information from other staff members: old and new; clerical, paraprofessional and professional, administrative; public service and technical service. We have also examined the report of the 1984 Task Force on Staffing and Management, part of the OMS Public Service Study at Temple University Libraries, which, among other things, analyzed the status of staff orientation and development here. (See Appendix B of this report which contains an excerpt from the 1984 report). Our Task Force now proposes a five-point program which should answer some of the CLS needs for a consistent program of system-wide orientation and training for public services staff. Many of the facets of the program can also be utilized as an orientation program for other library staff. We have not attempted to plan a program now that encompasses all of the recommendatons we have received. Rather we have proposed a basic program with which to start and a plan for examining and addressing other concerns and recommendations as the program evolves in the future.

ORIENTATION AND TRAINING NEEDS

Beyond review of the Report of the Task Force on Staffing and Management, our Library-wide Staff Orientation and Public Services Training Task Force sought advice from department heads and staff members. The Task Force itself consists of staff from all parts of CLS who relayed to the group their ideas and suggestions and those expressed by their co-workers. In addition, input was solicited from staff and administration via their responses to memos, questionnaires, and in some cases, personal interviews. All of these different sources reiterated and confirmed certain fundamentals:

(1) all staff, public service or otherwise, full-time, part-time or student, need some basic level of orientation to the CLS

(2) consistent orientation should provide staff with a better overview of the library and its goals

(3) non-public service employees need some public service training as they may be approached by patrons for assistance when in public service areas

(4) staff orientation and public service training can be useful for old as well as new employees because of the historic lack of consistent orientation and training programs in most CLS departments

(5) branch employees need orientation similar to Main Campus staff, so they can understand the CLS as one system and can provide quality information and referral services; they also will benefit from training to develop their public service skills

(6) there needs to be a firm commitment of administrative and staff support for this program to continue and develop

(7) ongoing needs assessment and program evaluation need to be planned for

THE ORIENTATION AND TRAINING PROGRAM PROPOSAL

The above considerations served as a basis for our planning a program for orientation and training as charged by the Director. We sought to include a variety of program elements that would by one method or another help all the different participating staff members meet certain objectives. We also treated student workers as separate groups within the tiers, not because we consider their orientation any less important than that of the full-time staff, but because of certain realistic constraints: the limited amount of time they spend at work, their rapid turnover rate, and the problem of scheduling conflicts that would almost certainly arise if we had planned exactly the same program for them as for regular staff.

GOALS

The primary goals we suggest our program should meet are:

(1) To introduce staff to the Library's organization, mission, departments, and policies

(2) To orient staff to Library's physical environment, collections, and facilities

(3) To familiarize staff with the Library's varied collections and resources such as the card catalog, the online catalog, and TULSH, which are needed to access them

(4) To provide a source by which current information regarding CLS could be made accessible to all staff to keep them abreast of the changes in the system

(5) To provide additional staff development opportunities in the form of sessions covering a variety of topics of particular relevance to those in public service, including new system-wide developments such as the online catalog, more in-depth examinations of CLS's resources and collections, and communications skills

(6) To propose a model for a library-wide standing committee which will provide long-term maintenance, coordination and planning for the orientation and training program

OVERVIEW

The program proposed consists of five parts:

(1) an individual tour of Paley for each new staff member, based on a Paley tour checklist to be used by the staff responsible for orientation in order that they may obtain consistency in their introduction of new staff to Paley facilities and personnel (see Appendix C)

(2) a Central Library System Services Manual (modelled after the Reference and Information Services Ready Reference Manual) which provides a variety of information about Temple, its Libraries, and CLS to be made available to all CLS departments (see accompanying Manual)

(3) a set of exercises to accompany the CLS Services Manual, to provide a self-guided tour of Paley, and to introduce some of Paley's resources such as the card catalog, Geac, and TULSH (see Appendix D)

(4) the Library Skills Workbook, currently in use by students and new staff in RIS (see accompanying workbook)

(5) a schedule of six orientation and staff development sessions to be spread over the academic year, covering a variety of topics, all of which public service staff would be required to attend and some of which non-desk staff would be required to attend

Each of these program elements is elaborated upon below. Basically, the three-tiered structure is built on the gradual inclusion of more and more facets of the program in the orientation and training of personnel in departments with increasing public service responsibilities. Full-service reference staff in the RIS Department presently have extensive orientation and training and continuing education programs which in effect serve as an already existing third-tier of our proposed program for Paley. We would make a recommendation that the branch libraries extend their training beyond maximum participation in the program proposed here by developing their own series of exercises modelled after those of RIS to introduce their libraries' facilities, policies, and collections to their staff.

Old staff as well as new staff should participate in various parts of the program. Because of the historic lack of system-wide staff orientation and training at CLS, we think this program should be viewed as a one of "reorientation" for old staff, providing them with opportunities to learn more about CLS, as well as an orientation program for new staff.

PROGRAM ELEMENTS

THE PALEY TOUR CHECKLIST

A new staff member needs to be introduced to the library: the staff, the facilities, and the services offered. He needs to know where things are. He needs to see how his work relates to the work done in other departments and how his work helps to accomplish the mission of the library. He needs to feel welcomed, a part of the whole. One way to accomplish this is through a guided tour conducted by a supervisor. The supervisor can personally introduce the new staff member to other members of the staff in his department and throughout the library. The supervisor can point out important locations in the library, explain the services offered by the various departments, and answer any questions. The Paley Tour Checklist provides the supervisor with a list of essential information to cover in the tour. Using the checklist will insure standardization and consistency in the tours, while at the same time allowing for differences in personal style and interests. The new employee is not expected to remember everyone he meets and everything he sees on this tour. However, the information gained on the tour will be reinforced by the other elements in the program, and the tour will familiarize the new staff member with the names and places he will meet again as he continues his orientation and training.

Objectives*:

After having taken a guided tour of Paley, staff should be able to:

1. Find and direct others to important physical features of Paley including stairs, elevators, exits, rest rooms, etc.
2. Find and direct others to service points such as photocopiers, mail room, staff lounge, lecture hall, etc.
3. Find and direct others to all Paley departments and service areas such as Current Periodicals, Reference Area, Circulation Dept., stacks, etc.
4. Identify key people in departments and service areas.
5. Direct patrons to areas in library which will best meet their needs.

* Note: Each element of the program is a part of the whole and is meant to work in conjuction with the other elements. Each element reinforces and facilitates the attainment of the objectives of the other elements.

THE CLS SERVICES MANUAL

The CLS Services Manual has been developed to assist in the training of new staff and to provide up-to-date information on Central Library System activities which have a bearing on public services.

As a training tool, the Manual offers a thorough introduction to the CLS and its place in the larger Temple scene. This introduction is augmented by portions of the Self-Guided Tour and Exercises, another component of the proposed program. The tour and exercises work in conjunction with the Manual to acquaint new employees with the organization, staff, and services of the CLS. Much of the CLS Services Manual is taken up with policy and procedural documentation on CLS departments that is important not only in an instructional setting but also valuable in dispensing information at public service points. The Manual is viewed, therefore, as a basic reference source on the CLS, designed to be regularly updated and revised to answer current informational needs.

Public Services Units that use the Manual will be encouraged to add to it any internal documentation that might be too specific to be included in the core Manual and to adapt it in ways that best suit their individual needs.

The Task Force recommends that each CLS department be provided with a copy of the CLS Services Manual. Departments with multiple public service points or units in physically remote sites should receive copies for each desk and/or unit.

Objectives:

After having examined the CLS Services Manual, staff should be able to:

1. Find information about Temple University, including maps, bus schedules, etc.
2. Find information about Temple University Libraries, including their locations, telephone numbers, and services offered.
3. Use organization chart, staff lists, processing flow chart, and descriptions of library departments and branches to determine appropriate ways to meet needs of patrons.
4. Describe the services available in each of the departments and service areas.

THE SELF-GUIDED TOUR AND EXERCISES

People learn by doing. The guided tour and the CLS Services Manual provide essential information for the staff member. The self-guided tour and exercises give the staff member the opportunity to interact with the material in ways which can increase comprehension and retention of the information. The self-guided tour asks the staff member to return to the areas he visited with his supervisor and respond to questions. To complete the exercises, he must use the CLS Services Manual and may also consult the people he met on the guided tour. The exercises also require that the staff member get hands-on experience with the library's resources. When the answers to the questions are checked, any problems can be discovered and solved.

Objectives:

1. Completing the self-guided tour in conjunction with the use of the CLS Services Manual should enable the staff to:
   a. Label on a floor plan the library offices, departments, units, and service areas.
   b. Name key people in library departments.
   c. Identify location symbols associated with collections, colors associated with the parts of the card catalog, and other information required to access the collections.
   d. State procedures for finding books which are not on the shelves.
   e. Use TULSH to find call numbers of bound periodicals.
   f. Arrange call numbers in the order in which they would appear on the shelves to demonstrate comprehension of shelf order.

2. Completing the exercise on Temple University campuses and libraries should enable the staff to:
   a. Use maps to find locations and information about transportation.
   b. Use staff lists to identify personnel.
   c. Use the phone system to place calls, transfer calls, put calls on hold, and pick up calls ringing on another extension.

3. After having completed the GEAC exercise, staff should be able to:
   a. Shift from one GEAC mode to another.
   b. Find items in the online catalog by title, author, author-title, subject, and keyword, including use of truncation.
   c. Move from one screen to another as needed to find items.
   d. Find location and call number on the brief record.
   e. Determine status of book from brief record.
   f. Find call number for items which are not barcoded.
   g. Determine additional subject headings from FUL screen.
   h. Determine what items are on reserve for a professor or a course.
   i. Determine patron's status.

THE LIBRARY SKILLS WORKBOOK

The Library Skills Workbook is designed to introduce students to the basic skills necessary to do research in Paley Library. It begins with a description of the physical layout of the library and the locations of the service areas and collections. After reading a description of sources of background information found in the Reference Area, the staff member must use these sources to find information on a topic. After reading about how to find books on a topic, the staff member then answers questions designed to give him hands-on experience with the Library of Congress Subject Headings and the card and online catalogs. The next section explains how to use indexes to find citations to articles in journals and newspapers and essays in books, and how to use TULSH to determine the location of serials. Again, the questions following the text give the employee hands-on experience with the indexes and TULSH. Finally, the workbook explains how to retrieve materials, and the questions reinforce the essential skills.

Completing the workbook will enable the staff member to understand the basic research process. Thus, he will be better able to help students or refer them to the area of the library where they will find the information they need.

Objectives:

After having completed the workbook, staff should be able to:

1. Locate background information on a topic in reference materials such as encyclopedias and dictionaries.
2. Use the card catalog and the online catalog to find books on a subject.
3. Use indexes to find articles on a subject.
4. Identify the elements of a citation.
5. Use TULSH to find journals and newspapers.
6. Arrange call numbers in correct order.

STAFF DEVELOPMENT SESSIONS

Beyond orientation to the Library and basic introduction to its resources and collections, staff members need "reinforcement of appropriate attitudes and skills and continuing education to keep up with rapid change", as our Director pointed out in his charge to the Task Force. To these ends the Task Force proposes a tentative schedule of staff development sessions which would be conducted during the next academic year and which all staff could attend. These programs also serve the additional advantages of:

(1) helping to establish personal contact between new staff and old staff and library administrators
(2) reiterating information covered in other areas of orientation and training
(3) providing training in some areas where written information and instructions may not be sufficient

SESSION I: ORGANIZATION, ADMINISTRATION AND MISSION OF CLS

This session should be held at the beginning of each semester: in this case, it could perhaps appropriately be held before the first staff meeting of the semester. All staff regardless of status would be invited. We propose that it should be conducted by upper and middle level administrators, preferably the Director or Associate Directors along with department heads. The Director or Associate Director(s) should introduce themselves and describe the administration, organization, and mission of the Central Library System. Their presentation(s) would serve as an introduction to each individual administrator below the level of Associate Director who would cover his/her area(s) of responsibility including departments or branches supervised, services provided by those units, their policies and schedules and staff, etc.

Such a session would provide opportunities
(1) for staff to become acquainted with the library's administrators
(2) for administrators to communicate directly to staff the mission of the library
(3) for administrators to emphasize the importance of public service
(4) for department and branch heads to acquaint staff better with the policies and procedures of their individual departments that may impact on service.

SESSION II: PUBLIC SERVICES FORUM

Again, the Public Services Forum should involve library administrators as well as a cross-section of CLS public service staff. Trends, issues, and problems in public service could all be addressed in discussion and exchange rather than by the lectures proposed for some of the other programs.

SESSION III: DEALING WITH THE PUBLIC: INTERPERSONAL AND COMMUNICATIONS SKILLS

This workshop would cover skills and strategies which for the most part cannot be learned from print but only from experience. If possible, this workshop would be open to everyone who works with the public. Further down the line we might need to consider restricting attendance depending on what is to be included in the workshop or possibly splitting into separate groups during the workshop to accomodate certain methods. For instance, any number of people can watch a video and then discuss it but role-playing generally works better in smaller groups. Details for this workshop have yet to be worked out, but we anticipate involving a variety of people in this workshop, including experienced public service staff and professionals from the University Counseling Center and University Services with expertise in these areas.

SESSION IV: TEMPLE UNIVERSITY'S ONLINE CATALOG

Although use of the Library Skills Workbook will introduce staff to the online catalog, there are many facets to the online catalog that may be of use to staff that cannot be adequately covered in the workbook or even in a written exercise. A workshop such as this gives staff the opportunity to ask questions: this is a provision that is important given that such a system may be completely new to many.

It is recommended that such a workshop be given by either RIS's Desk Services Coordinator or Library Instruction Librarian, both of whom have experience in instruction of staff and/or patrons, with advice from various departments about what particular aspects of the online catalog are of interest to their staff. Access to this workshop might need to be restricted to full-time and part-time employees because of space constraints around our terminals. Use of the Library Skills Workbook and the Geac exercise would at least introduce student workers to the online catalog even if they could not attend the workshop.

SESSIONS V AND VI: CARD CATALOG, INDEXES AND TULSH

A recommendation similar to the one above for the online catalog workshop could be made for the card catalog, the indexing and abstracting tools in Reference and Information Services, and TULSH. Somewhat larger groups could be handled in these workshops than in Program IV, so we might recommend that students be included in these two. The Library Skills Workbook would again serve as a back-up introduction to these resources for those who cannot be scheduled for these workshops.

Objectives:

1. After having attended the program on organization, administration, and mission of the Central Library System, staff should be able to:
   a. Identify the library administrators.
   b. State the mission of the library.
   c. Interact with patrons at the public services desks in ways which demonstrate recognition of the importance of public services.
   d. Explain to patrons the policies and procedures of their departments that impact on service.

2. After having attended the public services forum, the staff should be able to better understand issues in public service, including the need for good public relations, inter-departmental cooperation, and effective communication.

3. After having attended the program on dealing with the public: interpersonal and communication skills, staff should be able to:
   a. Determine patron's needs through effective communication and either provide the service or refer the patron to someone who can.
   b. Greet and interact with patrons in ways which encourage patrons to ask for help.
   c. React politely, patiently, and pleasantly when problems arise at the desk.

4. After having attended the program on the online catalog, staff should be able to use and demonstrate the use of the online catalog.

5. After having attended the program on the card catalog and the indexes and TULSH, staff should be able to use and demonstrate the use of these resources to find information and materials.

REGARDING: VIDEO TECHNOLOGY

We would further propose that for either Program II or Program III, the Library consider purchasing at a cost of $130 the forthcoming ALA videotape "If It Weren't for the Patron", contingent upon its previewing. This popular videotape "incorporates material on contemporary aspects of public service....Basic communications skills and library service methods are emphasized." (See copy of ALA flyer in Appendix E). In general, we recommend that the Library consider investing in video technology, at least for staff development purposes, as more and more video materials related to training and continuing education in the library field are becoming available. Video players, videotapes and video cameras all could be used repeatedly for training purposes as diverse as screening videos like the one recommended above to recording role-playing for analysis in communications workshops.

THE THREE-TIERED PROGRAM

It is recognized that staff need to receive basic orientation to their work environment, facilities, policies, and procedures in addition to training required for them to perform their particular duties. But while job training is the responsibility of the individual departments, all staff can obviously benefit from a consistent, system-wide program of orientation and staff development. Moreover, staff at service desks or areas need elements of training and orientation in order to interact with and refer patrons appropriately. Finally, staff whose particular responsibilities extend to full-service reference require additional specialized training opportunities to acquaint them with and keep them abreast of new library sources and developments and to enhance their reference skills and strategies. Recognizing the different levels of needs for our library staff, we have proposed that elements of the program be applied in increasing number to those staff who have increasing public service responsibilities. The chart on the following page illustrates the increasing application of program elements to the orientation, and reorientation, and training of new and old staff.

First tier:

The first-tier consists of non-public service personnel who require a basic orientation to Temple and the Central Library System. They would:

(1) receive an individual tour of Paley by the staff person in their department responsible for training and orientation (preferably at a supervisory level) to give them an opportunity to associate some names with faces and locations as well as to acquaint them with Paley's basic lay-out

(2) take the set of exercises included as the second facet of the entire program, designed to work in conjunction with the CLS Services Manual, in order to review Paley's physical facilities at their own pace and introduce them further to Temple's campuses, libraries and the CLS Services Manual itself

(3) be required to attend the initial scheduled program covering the library, its mission, policies, and department, and they could attend others at their option

It is recommended that all the staff in this group, old and new, students and full-time, branch and Paley, complete the second and third elements of this part of the program in order to receive consistent orientation, or in the case of old staff, reorientation, and training via the self-guided tour and introduction to the CLS Services Manual.

Because of scheduling and time constraints, we propose that new staff only (excluding students) have the individualized guided tour.

SERVICES	PROGRAMS: Tour	Exercises	Workbook	Workshops
Reference				
Full- and part-time staff	✓	✓	✓	I-VI
Students	✓	✓	✓	As many as possible
Circulation/Reserve/ Other Public Services				
Full- and part-time staff	✓	✓	✓	I-VI
Students		✓	✓	As many as possible
Other Services				
Full- and part-time staff	✓	✓		I
Students		✓		I

Second-tier:

The second-tier would include staff from a variety of public service areas and desks. These staff are called upon to assist patrons in many ways including, apart from the particular service being performed, some information and referral services. This would include areas as diverse as Reserve, Current Periodicals, Collection Development, Special Collections, and branch and departmental libraries. In addition to following the orientation and training elements designated above for the first-tier staff, these staff would:

(1) complete the Library Skills Workbook; this would provide everyone working in public service areas with basic understanding of the library research process and additional exposure to CLS and its access tools and collections beyond that provided by the exercise sets

(2) be required to attend all scheduled staff development sessions and departmental tours

Again, we would qualify this recommendation in that only new staff (excluding students) would be required to have the guided tour.

Third-tier:

The third tier consists of staff performing full-reference service at Paley's RIS or at other CLS libraries. Again, in addition to our recommending that they complete all the facets of the program described above, we propose that:

(1) if they are part of the RIS staff, they complete the set of self-paced exercises already in place which introduce them to the department, its units, collections, and resources; additionally they should complete any exercises in the system-wide program which do not duplicate the RIS exercises

(2) all other reference staff from departmental or branch libraries should also complete similar exercises on their departments; as these exercises have yet to be developed by the departmental libraries and branches, we recommend that they be initiated as soon as possible by those staff responsible for public service orientation and training within the departments and branches, using the already existing RIS exercises as models

Again, only new staff (excluding students) would be required to have a guided tour.

BRANCH LIBRARY STAFF

We have treated branch staff the same as other staff for a reason: we feel that they should not be isolated from the rest of the library system simply because of the distance between their campuses and the main campus, but should feel themselves a part of the larger system, the CLS. Therefore, we hope that they will participate in the program along with the rest of the departments in spite of some of the constraints upon them. Also, we suggest that those staff responsible at the branches for training and supervision work in cooperation with any standing committee that follows us to develop fact sheets, exercises, etc. that will serve their particular needs for training, especially for reference and other public service staff.

PROPOSAL FOR IMPLEMENTATION AND MAINTENANCE

The present Task Force has planned the first part of an evolving and continuing program of staff orientation and development. For the sake of the program's continuity, we think that responsibility for implementation and maintenance of the program for its first year should be retained by the same people involved in its planning. After that responsibility for maintenance and planning for the program could be turned over to a standing committee. Therefore, we propose the following:

(1) Between March 1988 and May 1989 the Task Force should continue in force and assume responsibility for the implementation and maintenance of the program. During this period members will be responsible for:

   (a) upon acceptance of our program by the Administrative Council, conducting a preliminary, limited introduction of the written portions of the program (tour, exercises, CLS Services Manual) in June 1988 to obtain staff input and suggestions prior to initiating the program system-wide. We suggest that two staff members from every department, selected by each department's head, be introduced to the CLS Services Manual and perform the exercises at that time. Regardless of whether these staff members are old or new, we need to emphasize to them that we hope that this program will provide consistent orientation and reorientation to CLS throughout the library system and that all staff members will be participating in it towards that goal in September. We wish to make it clear to staff that selection for participation in the program's "trial run" and the program itself are intended primarily to rectify inadequacies in the system not in individuals. Based on feedback from staff in June and any additional recommendations from the library administration, the Task Force will then revise the program as necessary before Fall 1988 implementation.

(b) final production of all written materials--the CLS Services Manual, the exercises, description of workshops, copies of the checkpoints for the guided tour, etc.--prior to distribution to all department heads

(c) organising and conducting staff development programs through May 1989; updating materials as needed during the 1988-1989 academic year

(d) requesting that each department head either serve as or designate a committee liaison--a staff person in that department, usually with some training or supervisory responsibility--who will provide the standing committee with information necessary to update the manual, exercises or tours, and who will oversee administration of the program within his/her department by conducting tours, updating the manual, seeing that exercises are completed, noting attendance at staff development sessions, etc.

We do not think that the committee can assume responsibility for each individual department's adherence to and maintenance of the program, which is why we have recommended that a committee liaison be selected from each department. We think that it would strengthen the program if liaison responsibilities could be written into the designated staff person's job description. In some cases the liaison may also be a standing committee member.

(2) We propose that by May 1989 responsibility for maintenance and and planning of the program be transferred to a standing committee consisting of members selected by Administrative Council and reporting to the two Associate Directors. We recommend the committee be composed of the following:

(a) Chairperson of the standing committee should be the Personnel Librarian; as long as that position remains vacant, Administrative Council will appoint a chairperson from one of the committee's permanent members

(b) four permanent members, one from each of the following departments: RIS, Access Services, either Tyler or Ambler Libraries, and either Bibliographic Control and Database Management or Acquisitions and Materials Processing

(c) two members, serving one-year terms, selected from any department

The permanent membership will give the committee continuity, the temporary members will bring new perspectives and energies and allow a variety of staff to be involved in the program. We recommend that all levels of staff, administrative,

supervisory, professional, paraprofessional and clerical be considered for membership on this committee, either as permanent or temporary members. Training and/or supervisory experience are reasonable criteria for the permanent members.

We also suggest that the Administrative Council may want to select at least two appointees from the present Task Force to serve on the standing committee either as permanent or term members to assure a smooth transition from one group to another.

The standing committee, to be appointed by May 1989, would assume responsibilities for the maintenance and planning of the program from then on, including:

(a) soliciting material from liaisons and others to update the tours, exercises, etc.; providing committee-revised materials at least twice a year; and issuing interim notices as often as necessary to committee liaisons so that they can make manual corrections to their materials

(b) planning and conducting other staff development sessions on an on-going basis

(c) planning and conducting continuing needs assessment on which to base new plans for the program

(d) planning for future developments to extend the scope of the program, keeping in mind the additional recommendations of the OMS Public Services Self-Study and findings of (c) above

(e) planning and conducting an evaluation of the program

We also suggest that the standing committee meet at least once a month to plan and coordinate programs, review items for updating, etc.

ADMINISTRATIVE AND FINANCIAL SUPPORT

Administrative support of this program is critical if staff is going to view it as a viable, on-going program. We hope that the Library Administration will commit their energies to the program proposed here by promoting it whenever possible at staff meetings and committee meetings. We hope that they will actively participate in staff development programs already proposed, such as the one on the library's organization, goals, and missions and the public services forum, and others as requested by the standing cc mittee. Introduction of the project by the Director at a staff meeting prior to Fall 1988 is essential to inform the staff about the program prior to its implementation. Staff meetings can thereafter be used to maintain current awareness regarding the program, and to that end the standing committee may want to consider scheduling some of the staff development sessions in conjunction with staff meetings.

We think that having the committee report to the Associate Directors will be more efficient than having it report to the Administrative Council or some other person or body and will lend credibility to it.

This program will require funding and clerical support. While many of us on the Task Force have spent our own time organizing the materials for the program, we think there should be designated staff to whom we can turn for some of the clerical support we need. We also need to know that funding will be available for basics like paper, photocopying, etc. and on what basis we can apply and reasonably expect to have granted expenses for other things such as guest speakers and training videos. We have already made one recommendation regarding the purchase of video equipment and one ALA video. We request that arrangements for all of the above be clarified for the Task Force and the standing committee by the Associate Directors upon acceptance of this program by the Administrative Council.

In closing we must emphasize how important is the administrative support discussed above. Participation of all staff in the proposed orientation and training program is a large investment in staff time. Planning and conducting the program also represents a considerable commitment of time and energy for staff involved, particularly for the committee members and committee liaisons. In order for this program to be maintained and developed, the administration, from Director to department heads, must make clear to staff that they believe the investments required by it to be important and necessary.

APPENDICES

APPENDIX A

TEMPLE UNIVERSITY LIBRARIES
MEMORANDUM

TO: Gwendolynne Arthur

FROM: James N. Myers
Director of Libraries

SUBJECT: Library-wide Desk Training Task Force and Program

DATE: September 30, 1987

I am writing to appoint you chairperson of a Library-wide desk training task force. The responsibility of this group will be to develop plans for a Library-wide desk training program. The plans will be reviewed and approved by the Administrative Council and (assuming consensus) implemented.

It is important that we take our work directly with students and faculty seriously and professionally. I appreciate your willingness and that of your committee to take on the task. If any of us can be of assistance, I hope that you will ask.

I am attaching a copy of your July 17th memorandum as a starting point. The ideas expressed there received the full support of the council.

xc: Task Force members

Joe Zucca
Garrett Marsh
Jean Skipp
Carleton Schwager
Karen Dyson

Members of Administrative Council

MEMORANDUM
TEMPLE UNIVERSITY LIBRARIES

TO: Frances Hopkins, Associate Director for Collection Development and Public Services

John Zenelis, Associate Director for Automated and Administrative Services

FROM: Gwen Arthur, Reference and Information Services Desk Coordinator
Laila El-Zein, Acting Head, Bibliographic Control and Database Management
Mark Jacobs, Head, Reference and Information Services
Penelope Myers, Head, Access Services
Cornelia Tucker, Head, Acquisitions and Materials Processing
Joe Zucca, Supervisor of Circulation/Reserve, Access Services

SUBJECT: Library-wide Public Service Desk Training Task Force and Program

DATE: July 17, 1987

On July 8, 1987 we met to discuss our joint interest in improving service at the various public service areas in Paley Library. Our interdepartmental group, representing department heads and staff from these areas, would like to propose the formation of a library-wide public service training task force. The purpose of the task force would be to prepare a training program general enough to provide appropriate library orientation for all library public service staff, professional and paraprofessional, old and new. If you agree with us that such a program could be of value to Temple Libraries, we would make the following suggestions regarding the structure of such a task force, the potential scope of its program and the variety of approaches such a program might include.

Task Force Membership and Agenda

We suggest that the task force be composed of department heads or appointed representatives from all departments that have staff directly serving the public. This group would include Reference and Information Services, Access Services, Acquisitions and Materials Processing (which includes staff from the Current Periodicals Desk) and Special Collections. We further suggest that a representative from the Libraries' branches be included and also a representative from the Bibliographic Control and Database Management Department to serve as a consultant to provide expert advice on technical matters impinging on public services, for instance, the online catalog. Tentatively, this task force would work through the fall semester to prepare the program for administration to an initial group of staff at the beginning of the spring semester 1988.

Scope of Program

We suggest the program aim to better introduce or orient library public service staff, old and new, professional and paraprofessional, to Temple University, its libraries' facilities and resources, and even more specifically, to policies and strategies for public service. In order to help keep the training program manageable and to be able to first observe its effect on a smaller group, we feel that it would be best to begin with Paley public service staff. After observing how the program progesses within Paley's public service groups, we would like to consider expanding the program, with your approval, to the staff at the branch libraries and perhaps non-public service staff.

Program Components

Our initial interdepartmental group meeting has already resulted in several suggestions that could be considered for inclusion in such a program, including:

(1) library tours

(2) productions of a library-wide Ready Reference Manual including information on library facilities, personnel, policies, collections, etc.

(3) workshops or training sessions, using various methods, including Temple staff presentations and relevant video-tapes, on desk service strategies and problem solving, telephone etiquette, online catalog instruction.

Our interdepartmental group wishes to present the above proposal for consideration by the associate directors responsible for the various departments which would be involved in the proposed program. We welcome any recommendations regarding this proposal from you. We also ask for administrative support for the project, recognizing that some clerical or financial support may be needed for implementing various facets of the program.

TEMPLE UNIVERSITY LIBRARIES

MEMORANDUM

To: Gwendolyne Arthur
Task Force Chair

From: James N. Myers
Director of Libraries

Subject: Library-wide Staff Orientation and Public Services Training Task Force

Date: November 23, 1987

On your recommendation and with the approval of their respective department heads, I have today appointed Beth Jacoby and David Weinberg as members of your task force, so that you will be able to continue work immediately after Thanksgiving.

The main purpose of this memo is to make more explicit my charge to the task force and to set a new dat for its initial report.

By using the term "Desk Training Task Force" in my September 30 memo appointing you as chair, I inadvertently narrowed the scope of your charge. When the task force was originally proposed in discussion with the associate directors, their understanding was that it would develop a three-level program -- an orientation component for all CLS staff, a second component for staff who regularly work at any public service point, and a third component of in-depth training for those who staff full-service reference desks. This was expressed in the proposal approved by Administrative Council, and it was and is my intention that the task force proceed on this basis. I hope that the revised task force name above conveys this sense of purpose.

Although staff members vary in the amount and kind of contact they have with library users, it is essential for everyone to be aware that the end purpose of all library work is to provide excellent service. If we want all staff to be responsible for demonstrating that awareness in all their contacts with users, then the library system is responsible for giving them and adequate knowledge of the library's organization and basic public service skills. Beyond that, those who have specific public service responsibilities need reinforcement of appropriated attitudes and skills and continuing education to keep up with rapid change. Your task force, in preparing a comprehensive plan for such training, will make a significant contribution to public service in the broadest sense of that term. It will also provide the Libraries with our first systematic CLS-wide staff

development program, which can become a model for future efforts. In view of changes in the task force membership and the coming holidays, March 1 now seem a realistic date for submission of the task force's initial report for review by Administrtive Council. This will still allow time in the spring for the task force to make any recommended revisions and, assuming the council's approval, to prepare and begin implementation by the beginning of the next academic year.

FLH/lmc

xc: Karen Dyson
Beth Jacoby
Garrett Marsh
Carleton Schwager
David Weinberg
Joe Zucca

Members of Administrative Council

APPENDIX B

REPORT OF THE TASK FORCE

ON

STAFFING AND MANAGEMENT

Steve Landstreet, Chair
Karen Aubitz
Ida Ginsburgs
George Libbey
Rhea Mihalisin
Larry Porter
Allison Sleeman

April 26, 1984

TABLE OF CONTENTS

INTRODUCTION.....1

STAFF TRAINING AND DEVELOPMENT.....1

STAFFING PUBLIC SERVICES.....8

STATISTICS.....13

COMMUNICATION.....15

POLICIES AND PROCEDURES.....17

SUGGESTED RESOURCES.....20

APPENDIX

CHARGE TO THE TASK FORCE.....A1

ACTION PLAN.....A2

INTERVIEW WITH DEPARTMENT HEADS AND SUMMARY.....A4

SERVICE POINTS AND HOURS.....A39

RECOMMENDATIONS OF THE TASK FORCE ON STUDENT EMPLOYMENT.....A41

INTRODUCTION

The following report by the Task Force on Public Service Staffing and Management was developed over the two-and-a-half month period from February through April 1984. Utilizing advice from the OMS consultants, Ann Randall and Pat Swanson, and the Study Team chairperson, Linda Cotilla, the seven members of the Task Force analyzed the charge to the Task Force and isolated five primary areas of concentration: staff training and development, staffing patterns, statistics, communications, and policies and procedures. The descriptive inventory of the Central Library System, prepared by the Study Team, helped in formulating the interview questions that were eventually posed to department heads. Assembling, conducting, and analyzing the department head interviews comprised the bulk of the Task Force's work. Some subject research was done for certain areas and the Departmental Interviews conducted by the Study Team were also used in making the recommendations contained within the report. A few areas, such as recommendations on staff morale or definitive statistical record-keeping format, were judged to be beyond the scope of the Task Force as it was currently constituted. Nevertheless, we hope that the recommendations that we have suggested will be useful to the Study Team in preparing its Final Report on Public Services in the Central Library System of Temple University.

STAFF TRAINING AND DEVELOPMENT

In reviewing the departmental interviews which were conducted by the Study Team, the Task Force on Public Service Staffing and Management has compiled a list of concerns by staff in the Central Library System (CLS) regarding staff training and development. We have arranged these concerns into four categories: Orientation, Staff Training, Cross Training, and Staff Development. (See Section A of each of these categories.) Apparently, the staff feels there is room for improvement in each of these areas.

The Task Force has also used the interview method as its tool for data gathering. Through carefully structured interviews with department heads, we were able to gain insight into the various aspects of staff training and development. The responses to these interviews have been summarized in Section B of the categories mentioned above.

In reviewing the information contained in the departmental interviews and the information we extracted from our structured interviews with department heads, we were able to arrive at some summary recommendations. We have kept in mind budgetary constraints and have suggested only things which could be done at minimal cost. We have arranged these recommendations in Section C.

Orientation

A. Departmental Interviews--There was a general recommendation that there be more staff orientations. Currently, many people are given their orientation long after their hire date. Orientations should also be structured differently for branch libraries not located near main campus. Attending one of the orientations here at Paley requires at least 1/2 day for staff members at Ambler, TUCC, Tyler, etc. Regarding the content of the orientations,it was suggested that an overview of the inter-relationships among the various departments be included in addition to the department by department orientations. An annual update (possibly drawn from a department's annual report) concerning activities in each department for the year would also be quite informative. In addition, a revision of a "Self-Guided Tour of Samuel Paley Library" could be used in conjunction with the oral orientations. However, it would have to be expanded to include more than just Paley. Current handouts could also be expanded to include more than just Paley. Current handouts could also be updated to be used in orientations and the library could produce a slide/tape program. One final concern of the staff was that specialized units (e.g., CCC, Rare, BusRef, GovDoc, Maps) have more emphasis placed upon them so that all library employees are aware of what each unit has to offer.

B. Task Force Interviews with Department Heads--In reviewing

the information we obtained from our task force's interviews with department heads, we came to the conclusion that orientation is an important part of staff training. Some departments rely upon the orientation sessions organized by the Personnel Librarian. Most also include detailed orientations given by the new employee's supervisor. These orientations range from being informal and sometimes very brief (basically giving the new employee a tour around the building) to rather detailed written orientations, sometimes including a formal checklist. Some librarians and bibliographic assistants are given lengthy written orientation including scheduled meetings with department heads, unit supervisors, and co-workers.

The general feeling is that the orientations given by the Personnel Librarian are extremely helpful. However, there was some concern that they should be given more frequently because presently new hirees sometimes have to wait a few months until they can attend an orientation session.

It was re-emphasized that branch library staff members must travel long distances to attend many short orientaion sessions, and it would be much better if the sessions could be structured differently for them.

C. Recommendations

1. Maintain orientations given by the Personnel Librarian, but possibly add an overview of how the library, in general, works and the interrelationships among the various departments.

2. More frequent staff orientations.

3. Structure orientations for branches differently, possibly 1/2 day sessions covering several departments rather than scattered one hour sessions.

4. Updates derived from each department's annual report concerning activities (e.g., departmental changes in- cluding new policies, physical moves, staff changes, anything which might affect public services) in that department for the past year.

5. Revise "Self-Guided Tour of Samuel Paley Library", a pamphlet from the Reference department currently used by students and faculty, so that it can be used by all new staff as a self-paced orientation in conjunction with the oral orientations. It should include all departments of the Central Library System.

6. Update current handouts.

7. Make informative orientation packets for new employees, including information necessary for their first several days of employment. This could include a schedule for

the first day(s) (if applicable), a map of the university, checklist of all areas to be covered in orientation, any written orientation manual developed for the CLS, that would job description, etc.

8. A walking tour of the campus should be included in the new employee's first day of employment. Staff visits to CLS Libraries other than Main Campus should be scheduled sometime shortly after. The knowledge of building locations and other informa- tion garnered from a campus tour is very helpful in providing accurate public service.

Staff Training

A. Departmental Interviews--The staff also feels that there is a need for more staff training in the library. Currently, most training is done rather informally, and the bulk of it is "on the job". There appears to be a need for training so that there is consistency in the information given at each of the public service desks, especially in making referrals to other units or departments. It was felt that more extensive training should be done with students so that service can be improved. One other strong possibility would be to "resurrect" the Operations Manual which was begun several years ago. This Operations Manual was to include the statements of missions, goals, organization, policy, rules, regulations, and procedures which govern the operation of the Central Library System.

B. Task Force Interviews with Department Heads--All department heads interviewed seem to feel that the level of public services would definitely be raised with the implementation of more formal training methods, including written manuals. A lot of training is currently being done "on the job". Some departments do not have any written training manuals or guidelines. Some departments have training manuals consisting of procedures for services such as circulation, reserve, ILL, etc. However, there appears to be a lack of training in reference services, with a few exceptions. The Reference Department has developed training exercises that primarily introduce new librarians and bibliographic assistants to reference materials in all units of the Reference Department. Once the exercises are completed, the person who has done them discusses them with the desk coordinator. Many of the departments are interested in developing training exercises such as these, but cannot spare enough staff time to accomplish this.

It was apparent that department heads felt that better training of students yields better public service. In most departments, bibliographic assistants are responsible for training students, some of which use only on the job training and others which also use training manuals or workbooks. Again, there are very few, if any, training manuals for reference services.

One of the departments would eventually like to develop "handy hints" sheets to aid staff and student workers in providing elementary reference services.

C. Recommendations

1. Consistent levels of training of all staff a public service desks is essential.

2. Develop training manuals for each unit, for both staff and student workers.

3. Assign a committee to complete the Operations Manual.

4. Develop training exercises for reference services system-wide similar to those used by the Reference Department at Paley.

5. Develop ready reference cards, manuals, or handout sheets to be used by staff at all public service desks.

6. Emphasize consistent student training including public services training, so that they do not provide misinformation to library patrons.

7. Training of staff or student workers could be done utilizing the university's vast computer capabilities through the production or purchase of software designed to teach library skills. There has been success at Indiana University in using their PLATO computers (which we have in Engineering/Architecture Library) to train student workers in the use of the card catalog and LC call numbers. More programs could be developed to assist in training both staff and students in various aspects of library public services.

Cross Training

A. Departmental Interviews--There were mixed reactions from staff on cross training. One recommendation which came up more than once was that there should be public service training for staff not in public service jobs so that they could be more knowledgeable in those areas. On the other hand, some staff members feared that cross training would discourage the university from filling vacant positions when they could cross train and shift the extra work to another staff member. However, it should be emphasized that the cross training we are recommending is not for the purpose of increasing workloads but to enable staff to become familiar with procedures in other departments which will facilitate better public service, especially referrals.

B. Task Force Interviews with Department Heads--There were

several instances of cross training within the CLS departments. In some of the smaller libraries, cross training of staff is necessary because, due to their small size and lack of back-up staff, everyone needs to know how to do everyone else's jobs. Also, many of the clerical staff members have been cross trained to do data entry on GEAC. Eventually, more staff members will become involved with GEAC. There are few examples where there is inter-departmental cross training (other than GEAC). There are two staff positions, however, which are currently being shared by three departments (SMAT, Reference, Access).

Several department heads indicated they would like to see some cross training for their staff. It was recommended that the SMAT desk supervisor work at the Information Desk to get an idea of the types of questions received there and the types of referrals made. It was also suggested that all TSD staff should have some contact with public services. This was found to be essential in planning for GEAC and has implications for future planning. Special Collections also feels there is a need for some cross training within their department. The Engineering/Architecture Library would like to eventually train its bibliographic assistant to work in the Departmental Libraries if there is a merger between the two departments. This way, when a departmental staff member is absent, the bibliographic assistant can fill in. (Currently, there is only one person who is the back-up for all the Departmental Libraries). One of the librarians at Ambler also suggested it would be useful to have some sort of job exchange (for example, for one week, an Ambler librarian could work at the BusRef Desk and vice-versa). Apparently, there are various ways to implement a cross training for the mutual benefit of all involved.

C. Recommendations

1. There should be public service training for staff not in public service jobs so that they are able to properly assist library patrons when approached.

2. Cross training should be used only to assist staff members in providing more knowledgeable information in many facets of the library, with the exception of the smaller units or departments where it is sometimes necessary for everyone to understand everyone else's jobs.

3. Cross training to alleviate staffing problems within departments due to absences is very essential. For example, there should be some cross training in Special Collections because currently, if there is a staff absence, no other staff members are able to assist patrons due to the specialized nature of the collections.

4. Staff sharing has not been regarded with high

favor so we do not recommend it on a permanent basis. Some problems could arise in regards to staff fragmentation.

5. However, we recommend that job exchanges on a short- term basis be utilized for legitimate cross training among units or departments. For example, in order to make better referrals to branch libraries from Paley, there could be a job exchange between staff members from those areas, possibly for a week.

Staff Development

A. Departmental Interviews--It was readily apparent from the departmental interviews that more staff development is desired. Examples mentioned in the interviews were a workshop on how to deal with patron hostility and a repeat of the workshop given by Reference on telephone courtesy and transferring procedures.

B. Task Force Interviews with Department Heads--One of the frequently mentioned recommendations which came out of our interviews with department heads was the need to emphasize staff development. Currently, most departments have no in-house staff development programs. However, they feel this is not only an important way to improve public services, but also a possible way to improve staff morale. Most departments now encourage their staff (usually professional librarians) to attend conferences which are relevant to their jobs. But they also feel there is a need to increase the level of staff development and extend it to all levels of staff.

Another point which was mentioned several times was that any staff development program implemented should be coordinated by one person or office. An outcome of the reorganization of the library several years ago was that the Personnel Librarian would be in charge of continuing education for staff. However, due to the demands upon his time (because of the vacancies of library director and head of the Administrative Services Department), he has been unable to concentrate his efforts on staff development.

Several depatment heads gave examples of the types of workshops they feel would be beneficial:

1) Engineering/Architecture--workshops on the use of the micro-computers and the audiovisual equipment their department maintains;
2) TUCC--workshops on how to best provide reference services;
3) Reference--update/refresher sessions incorporated into Reference staff meetings on sources/items which are of importance to Reference staff;
4) Ambler--workshops on new reference materials. Many department heads felt the in-house workshops the Reference Department conducted on telephone courtesy were very useful

and would like to do something along the same lines within their departments or system-wide.

Overall, the general feeling was that the level of public services would definitely be raised with an organized program of staff development with higher priority than it is currently being given.

C. Recommendations

1. Staff development should be expanded as it is an important part of raising the level of public services and we believe staff morale will be affected positively.

2. Staff development should be coordinated by one person, office or committee which would be responsible to the Personnel Librarian.

3. It should be given higher priority than it is currently given.

4. There should be more in-house workshops and seminars dealing with both systemwide and departmental public service issues of concern to library staff.

5. Workshops originating outside the library should be publicized if applicable to staff and all levels of staff should be allowed to attend if the information is relevant to their job (keeping in mind cost).

6. There should be a staff reading collection which consists of professional literature in the form of books, journals, reports, etc. and any peripheral information relating to staff development (such as brochures, etc.).

7. Professionals should be encouraged to attend conferences, publish articles, participate in professional organizations, etc.

8. All staff should be kept up-to-date on computer developments and should be knowledgeable of the systems currently in use in the CLS.

9. The time and money required for participation in staff development activities should be a shared responsibility. Neither the individual nor the library should be expected to provide all of the support. However, it is more an investment for the organization so the library should be responsible for bulk of it.

APPENDIX C

ORIENTATION TOUR CHECKLIST

A new employee can benefit from a guided tour of the library. The tour should introduce the employee to the staff and the services they offer and make the newcomer feel welcome. Each new employee should be given an individual tour, although it may be more convenient to take a small group to the science and departmental libraries.

Positions of key people in each area are listed. Using the CLS Services Manual, fill in the names before the tour begins. Feel free to make additional introductions and to include additional information. It is especially important to introduce people in other departments with whom the new employee will be working. Note their positions and names also before the tour begins.

The tour should be given in conjunction with the use of the CLS Services Manual and an interview to explain the position, the department goals, the organization of the library, schedules, equipment and supplies, and other personnel matters such as absence from work and university and library policies. This checklist provides a guide to follow, in any convenient order, to make the tour as effective as possible. After the tour, please give the checklist to the new employee for future reference.

I. Ground Floor

____A. Stairs/Elevators/Exits/Fire exits/Fire extinguishers--
Note these on all floors.

____B. Phones--Note these on all floors.

____C. Staff lounge

____D. Rest rooms--Note these on all floors.

____E. Bulletin boards

____F. Lecture hall

____G. Photocopy machines--Note these on all floors.

____H. Mail room

____I. **Current Periodicals / Micromaterials Unit**
This unit reports to the Access Services Department.
Personnel

Position	Name
Unit head	

Services offered
Access to current periodicals and information about binding
Access to micromaterials

____J. **Serials** (Room 6)
This unit reports to Acquisitions and Materials Processing.
Personnel

Position	Name
Unit head	

Services offered
Information about ordering journals and magazines, serials not received, and prices

____K. **Center for Public History**
In this area is the **Photojournalism Collection**, which is part of the **Urban Archives**. These units report to the Special Collections Department.
Personnel

Position	Name
Curator, Urban Archives	
Asst. Curator, Urban Archives	
Curator, Photojournalism	

Services offered
Access to archives of area businesses, civic groups, labor organizations, and individuals, including historical maps, photographs, tapes, as well as books and pamphlets.
Access to clippings file of the Bulletin
Access to photographs and negatives from the Bulletin and Inquirer
Information about newsfilm from TV Channel 6 WPVI and Channel 3 WKYW
Research assistance in the use of these archives

___L. **Audio room** (Room 30)
This unit reports to the Zahn Instructional Media Center.
Personnel

Position	Name
Unit head	

Services offered
Facilities for listening to recordings, collected primarily for class assignments

II. **First Floor**

Access Services Department--Head,

____A. **Circulation Unit**
Personnel

Position	Name
Supervisor of Circulation/Reserve	

Services offered
Patron and staff registration--Take a moment to barcode ID.
Check out books.
Return books.
Pay fines.
Check on missing books.
Put holds on books.
Intra-library loan--Request books and photocopies from other campuses of Temple.
Acquire public domain software.
Lost and found
Get change.

____B. **Reserve Area** (Room 110)

Personnel

Position	Name
Bibliographic Assistant	

Services offered

Find books and articles reserved by faculty for their classes.

____C. **Interlibrary Loan Unit** (Room 113)

Personnel

Position	Name
Unit head	

Services offered

Get books and photocopies of articles not available at Temple.
Fill requests from other libraries.

____D. **Systems** (Room 101 West)

Personnel

Position	Name
Department Head	
Operations Manager	
Asst. Operations Manager	

Services offered

Management, support, maintenance, and assistance with GEAC systems and personal computers for library and office automation.

____E. **Public Catalog Area**

Services offered

Patrons use catalogs to find books by author, title, subject, etc.
Card catalog and online catalog needed to find call numbers.

____F. **Reference Area**

Personnel

Position	Name
Department head	
Computerized Reference Services	
Desk Services Coordinator	
Library Instruction Coordinator	
Reference Collection Development	
Map librarian	

Services offered

Reference staff answers questions about finding information.
Access to indexes to articles in periodicals and newspapers.
Access to encyclopedias, dictionaries, handbooks, maps, atlases.
Computerized reference services available.
Fact Sheets available as guides to using library.
Instruction in the use of the library offered.

____G. **Acquisitions and Materials Processing** (Room 101 East)

Personnel

Position	Name
Department head	

Services offered

Library materials are ordered and processed.
Gifts to the library are processed.

____H. **Binding unit** Room 104)

Personnel

Position	Name
Unit head	

Services offered

Information about binding of library materials

____I. **Bibliographic Services** Room 101 East)

Personnel

Position	Name
Department head	

Services offered

Catalog books
Maintain databases
Deal with call number problems

III. **Mezzanine**

Special Collections Department--Head,

____A. **Conwellana-Templana Collection/Rare Books & Manuscripts** (Rooms 145, 147)

Personnel

Position	Name
Curator	
Bibliographic assistant	
Bibliographic assistant	

Services offered

Access to archives of Temple University and papers of its founder, files of Temple publications and dissertations, books written by Temple faculty and graduates, and other Temple-related materials

Access to collection of early, rare, scarce, and valuable printed books, manuscripts, archives, prints, drawings, photographs, and artifacts

____B. **Contemporary Culture Collection** (Room 132)
This unit reports to the Special Collections Department.
Personnel

Position	Name
Curator	

Services offered
Access to alternative press and small press publications and the indexes to these publications.

____C. **Administrative Offices** (Room 136)
Personnel

Position	Name
Director	
Associate director for Collection Development & Public Services	
Associate Director for Automated & Administrative Services	
Secretary	

Services offered
Offices of director and associate directors
Conference Room 137

____D. **Administrative Services Office** (Room 127)
Personnel

Position	Name
Support services unit head Duplicating services	
Financial services manager Supplies	
Facilities coordinator	

Services offered
Duplicating services, supplies, building maintenance, security, and fiscal services, and personnel matters.

IV. Second Floor

Note location of GEAC terminals and TULSH.

____A. **Collection Development** (Rooms 215, 218, 220)

Personnel

Position	Name
Department Head	
Humanities bibliographer	
Social Sciences bibliographer	
Science bibliographer	

Services offered

Librarians select materials for purchase by the Central Library System, evaluate the collection, weed it, and serve as liaisons with faculty.

__ __B. **Stacks** (Room 210)

This unit reports to the Access Services Department.
Note arrangement of materials by call numbers-- A-E, F-H.
Sorting shelves and carts are places to look for books.
Chinese collection
Personnel

Position	Name
Stacks unit head	

Services offered

Materials are shelved and shelves are kept in order.
Assistance in finding materials.

____C. **Nevil/Piaget Collection** (Room 202)

This will be merged into the stacks soon.
Services offered

Access to non-circulating collection on educational psychology and learning disabilities.

____D. **Study rooms** available for discussion, group study

____E. **Room 209**: Library instruction classroom.

V. Third Floor

Note location of GEAC terminals and TULSH.

____A. **Government Documents / Business Reference Area**
These units report to the Reference & Information Services Department.
Personnel

Position	Name
Business librarian	
Government documents librarian	

Services offered
Access to business reference collection and indexes to business periodicals and statistics.
Access to publications of federal and Pennsylvania governments and some United Nations documents
Reference assistance for using the collections.

____B. **Stacks**
J-PN, PQ-Z
Temple Dissertations

____C. Study rooms
____D. Meeting room 309

VI. Departmental Libraries

____A. **College of Engineering, Computer Sciences, & Architecture Library**
Location: Engineering, Computer Sciences, and Architecture Building, 12th & Norris Streets, Room 201
Personnel

Position	Name
Head, CECSA & Science Libraries	
CECSA Librarian	

Services offered
Access to undergraduate and graduate materials in engineering, computer sciences, and architecture

____B. **Biology**
Location: Biology-Life Sciences Building, 12th & Norris Streets, Room 248
Personnel

Position	Name
Bibliographic Assistant	

Services offered
Access to graduate-level materials in biological sciences

____C. **Chemistry**
Location: Beury Hall, 13th & Norris Streets, First Floor
Personnel

Position	Name
Bibliographic Assistant	

Services offered
Access to graduate-level materials in chemical sciences

____D. **Physics Library**
Location: Barton Hall, 13th & Berks Mall, Room A-209
Personnel

Position	Name
Bibliographic Assistant	

Services offered
Access to graduate-level collection in physical sciences

____E. **Charles L. Blockson Afro-American Collection**
Location: Sullivan Hall, Berks Mall and Park Mall, Room 101
Personnel

Position	Name
Curator	
Librarian	

Services offered
Access to collection of materials on black history and other Afro-American information

____F. **Mathematical Sciences Library**
Location: Computer Building, Broad & Montgomery Streets, Room 407
Personnel

Position	Name
Bibliographic Assistant	

Services offered
Access to graduate-level materials on mathematics, pure computer science, and statistics

____G. **Zahn Instructional Materials Center**
The Zahn IMC includes the education collection and also the **School of Social Administration Library**, the **Film Library**, and the Audio Room (Paley).
Location: Ritter Hall Annex, 13th & Cecil B. Moore Streets, Room139
Personnel

Position	Name
Head	
Librarian	

Services offered
Access educational and social services administration materials, including printed material such as books, textbooks, curriculum, guides, and tests and audiovisual equipment and material such as films for classroom use, film strips, slides, videotapes, and recordings

APPENDIX D

Paley Library, 02/88
Self-Paced Training for Staff
Exercise #1

PALEY LIBRARY--SELF-GUIDED TOUR

First, before you begin this exercise find the CLS Services Manual in your department. Each of the self-paced training exercises is based on information contained in sections of this manual. Although the exercises will introduce much of the information the manual contains, you cannot expect to remember it all in detail. It is very important, therefore, that you get familiar with the CLS Services Manual so you will be able to look up things quickly when you you need information in your work.

Objectives:

PART A of this training exercise is intended to make sure that you know the locations and major units of all Paley departments.

PART B covers basic information about the public catalog, TULSH, and the general book stacks.

A. PALEY DEPARTMENTS

When you work at a service desk, it is important that you be able to give simple, clear directional information to inquirers. Therefore, please:

- Visit all the places listed below.
- Sketch in and label rooms, areas, etc., on the attached blank floor -lans as directed.
- Fill in the blanks to complete statements or answer questions by consulting the CLS Services Manual or staff members in the area you are touring .

Before you begin the tour, find the following pages in Section IV of the CLS Services Manual, labeled PALEY LIBRARY, and Section VI labeled ACCESSING THE COLLECTION:

Floor plans for Paley Library
Library Fact Sheet: Paley: Location Symbols (also available on the library guides rack).

You may also want to consult Section III of the CLS Services Manual, CENTRAL LIBRARY SYSTEM, for the page titled

Central Library System: Partial Staff List by Function

These will provide most of the information necessary to complete the worksheets for Part A. Occasionally, you may have to ask staff members in the various units for additional information.

1. Go to the Library Administrative Offices on the Mezzanine. Sketch in and label (a) the Director's Office and (b) the Associate Directors' Offices.

At the desk you may receive inquiries about
- library jobs;
- new staff members or student assistants, whose names are not on the staff list.

Such inquiries should be referred to the Director's Office.

2. Go to the Administrative Services Office at the East end of the Mezzanine. The head of this office is _____.

The staff member in charge of Facilities Coordination, including building maintenance and security, is _____.
Sketch in his office on your floor plan.

3. Other areas on the Mezzanine are part of the Special Collections Department. Label on your plan

(a) Rare Book Room
(b) Conwellana-Templana Collection
(c) Contemporary Culture Collection.

Fill in the card catalog location symbols for the following:
_____Rare Books _____Templana

_____Conwellana _____Contemporary Culture Collection

The curator of the Contemporary Culture Collection is _____

(d) Library materials with the location symbol (URB) also belong to the Special Collections Department. They constitute the _____ Collection, which is housed on the _____ Floor. Go to that location now; sketch it in on your floor plan and label it. The two librarians in charge of this collection are:
_____ and _____.

The Head of the Special Collections Department, which comprises all the units you have just visited, is _____.

4. Now find and label Room 218 on your Second Floor plan. This office is part of Collection Development and you may find there librarians from various departments working as part-time selectors of books and journals for the general collection as well as those librarians who work there as full-time bibliographers.

5. Across from Room 218 and 220, you will find Rooms 209 and 210. Label them on your plan.

Room 209 is a classroom for bibliographic instruction. Students coming to Paley for instruction classes may need directions to this room.

Room 210 is the office of _____.
You may have to call this office to get help for people who have not been able to locate certain call numbers in the stacks. What is the extension? _____ (A list of extension numbers is in the CLS Services Manual; you are not expected to remember them all.)

6. Note on your floor plan the locations of the following facilities on the Second Floor, using the symbols indicated. Many people inquire about these at the First Floor service desks.

(a) Copies of TULSH for public use. Indicate the two locations with the letters TULSH.

(b) Online catalog terminals. Indicate with the letters GEAC.

(c) Photocopiers. Indicate the two locations with the symbol xc.

(d) Public telephones. Indicate with the letters Ph.

(e) Drinking fountains. Indicate the two locations with the letters DF.

These facilities also occupy the same general locations on the Third Floor.

7. Take the elevator down to the Ground Floor and locate the places listed below. Label them on your floor plan and fill in the blanks.

(a) Mail Room (Receiving Room). It is often necessary to refer delivery people here or to telephone the photocopier technicians here when the copiers need paper or repairs.
This area is part of the _____ Department.

(b) Gift Enclosure. This area is a unit of the Acquisitions and Materials Processing Department.

Questions relating to gifts should be referred to the head of that department, _____ .

8. Label on your floor plan the following units of the Current Periodicals Unit and fill in the blanks below:

(a) Periodicals Desk: Journal issues from current volumes are kept here until they are bound and shelved in _____ order in the stacks or are replaced by rolls of _____.

(b) Micromaterials Area and Micro Office: The three formats of micromaterials available for reading here are _____, _____, and _____.

(c) The office of the staff member in charge of Current Periodicals, whose name is _____ is in Room _____ .

(d) Audio Room: Are all the records and tapes in this collection recorded in the card catalogs on the First Floor? _____

9. Now mark the location of the photocopiers on your floor plan using the same symbol you used before, xc.

Also label the Lecture Hall on your floor plan. This room is often used by the Special Collections Department for exhibits. This department is also in charge of reserving it for meetings and other functions.

10. Go up to the First Floor, locate the following facilities, and label them on your plan using the symbols shown below:

(a) Public telephones - Ph

(b) Campus phone for public use - CPh

(c) Drinking fountain - DF

(d) Dollar changer and pen vendor - $/PV

(e) Photocopiers (label at least two machines West of the elevators and two on the East) - xc

11. Now label these areas on your floor plan:

(a) Acquisitions and Materials Processing Department.

The Head of this department is _____.

(b) Bibliographic Control and Database Management Department.

The Head of this department is _____.

Be sure that you never send a library user to these departments. If someone asks you for a specific staff member there, telephone that person. If a problem seems to require assistance from one of these two departments, first determine if you can handle the problem by yourself. If not, then consult with the staff in these departments yourself and advise the patron yourself of the outcome.

12. The Head of Access Services Department is _____.

Label on your floor plan the locations of the following and fill in the blanks:

(a) Circulation/Reserve Unit. The staff person who supervises this Unit is _____.

(b) New books display area.

(c) Interlibrary Loan Office. _____ supervises ILL.

These units, as well as the Stacks Unit, which is supervised by _____ _____ in Room 210, all belong to the Access Services Department.

13. The Head of the Reference & Information Services Department is _____.

Take a walking tour of the General Reference Area and the Maps & Atlases Area on the first floor and the Business Reference/Government Documents Area on the third floor. The CLS Services Manual contains a Fact Sheet showing the floor plan of the General Reference Area and a Fact Sheet for location symbols. Additional copies are on the Library Guides rack. Take these and use them as guides as you walk to the following points and fill in the blanks:

(a) Reference & Information Desk: Temple's list of serials, called _____ is kept at this desk and on a table nearby.

(b) Index tables: Notice the table numbers and the direction of the sequence. Also note that the indexes are arranged by _____.

(c) COMLIT cubicle: This is where online database searches are conducted.

(d) Offices: Rooms 121-125

(e) General reference stacks: Notice the call number locations as indicated by the large letters on the ends of the stack ranges. The location symbol for materials in this area is _____.

(f) Maps & Atlases Area: The location symbol for materials in this area is_____.

(g) The CLS Services Manual contains a Fact Sheet on Business Reference and Government Documents. Please take the elevator to this area on the third floor and pick up your own copy of the Fact Sheet at the BUS/DOC Reference Desk to fill in the blanks below.

The two location symbols associated with this area are _____ and _____. What is the title of one of the indexes to business periodicals shelved in this area?

_____

Find the shelves which contain census information. Do these circulate?_____ What is the title of one of the statistical indexes found in the BUS/REF area?_____ Librarians are available to help patrons during regularly scheduled hours.

B. LOCATING BOOKS AND JOURNALS

Requests for help in selecting subject headings or using the catalog should be referred to the staff at the Reference & Information Desk. However, anyone working at any of the service desks should be prepared to give out the basic information covered below. Familiarity with TULSH is essential, because a high proportion of users need help with it.

Please fill in the blanks below and mark your floor plans as directed. Most answers will be found by reading the following items in Section of the CLS Services Manual:

Library Fact Sheet: Paley: Using the Card Catalog
Library Fact Sheet: Paley: Finding Books and Bound Periodicals
Copies of these fact sheets are also available on the library guides rack.)

You may also use the Temple University Libraries Serials Holdings sheets, which are laminated to the covers of the TULSH volumes at the Reference & Information Desk.

1. What colors are associated with:

   (a) the Title Catalog? _____

   (b) the Author Catalog? _____

   (c) the Subject Catalog? _____

2. If a student is looking for books about Robert Kennedy or about the works of Norman Mailer, which catalog should she use? _____

3. Are books in the Biology Library recorded in Paley's catalog?_____ Are the collections of the Law and Health Sciences libraries included? _____.

4. If someone complains that a book listed in the card catalog is not on the shelf, where would you look to see if it has been checked out? _____.

If the patron then either wants to reserve the book if it is already checked out or have the book searched for by the library staff, he should be referred to the _____ Desk.

5. Look up Newsweek in TULSH. What is its call number? _____ On what floor is it shelved?_____.

6. Paley has a periodical called the Literary Cabinet. Where is it housed? _____.

7. Someone has citations for articles published in the journal Society in 1985 and 1987. What is the call number of this journal? _____. On what floor would the person find:

(a) the 1985 volume? _____

(b) this year's issues? _____

8. Mark the East and West sides of your plans for the second and third floors with the span of call numbers shelved in each area. The PQ - PS section of the books stacks is particularly difficult for people to find. It is located on the _____ side of the _____ floor, behind the enclosed area that houses _____.

9. Arrange the following call numbers in the sequence in which they should appear when properly shelved:

QP	PQ	P	QP	PQ	P
355.2	19	3556	355	19	3556
K83	R43	S6H4	M22	R5	S6N3

1. _____ 2._____ 3._____ 4._____ 5._____ 6._____

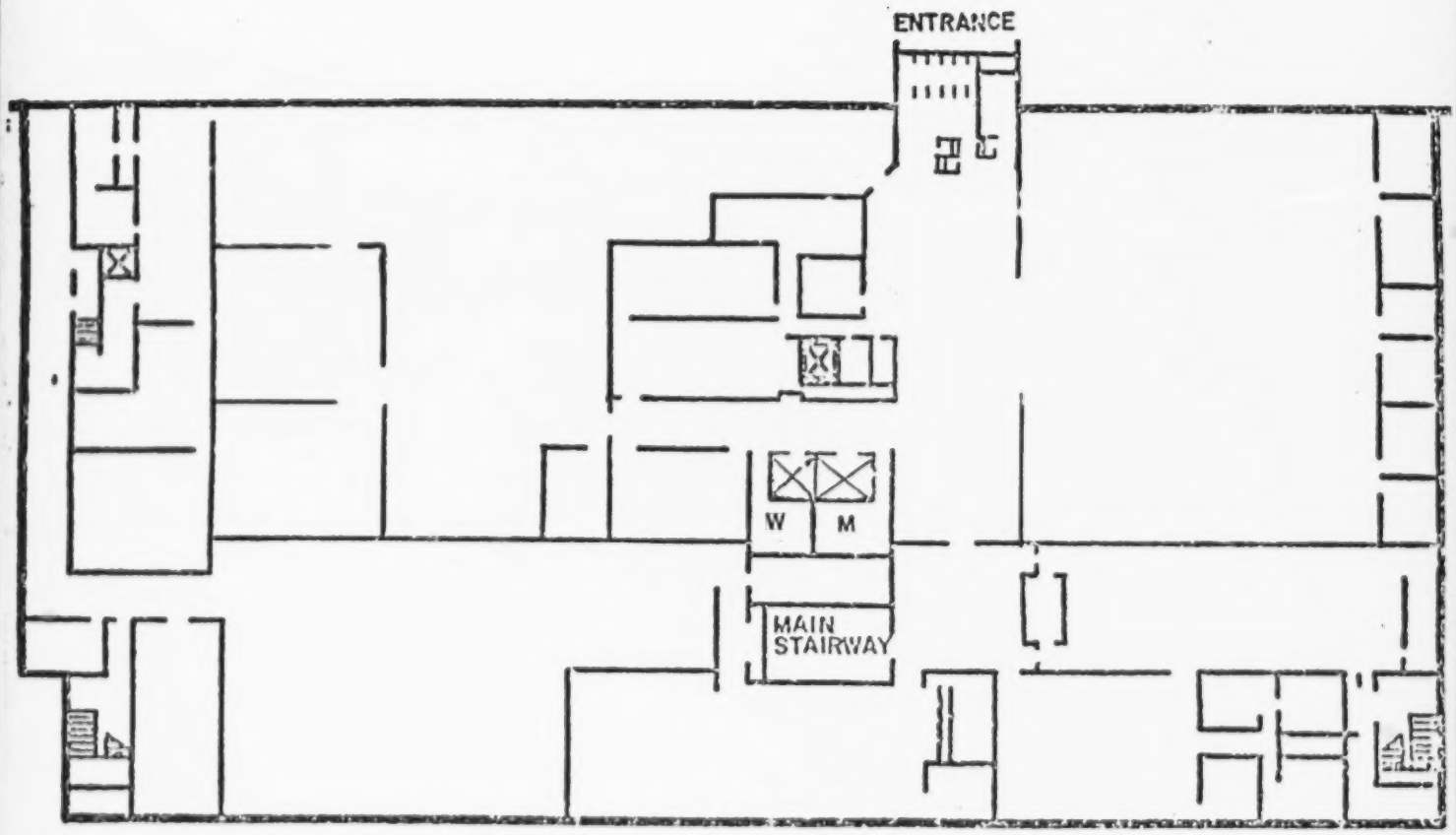
_____ _____ _____ _____ _____ _____

_____ _____ _____ _____ _____ _____

REVIEW OF LOCATIONS

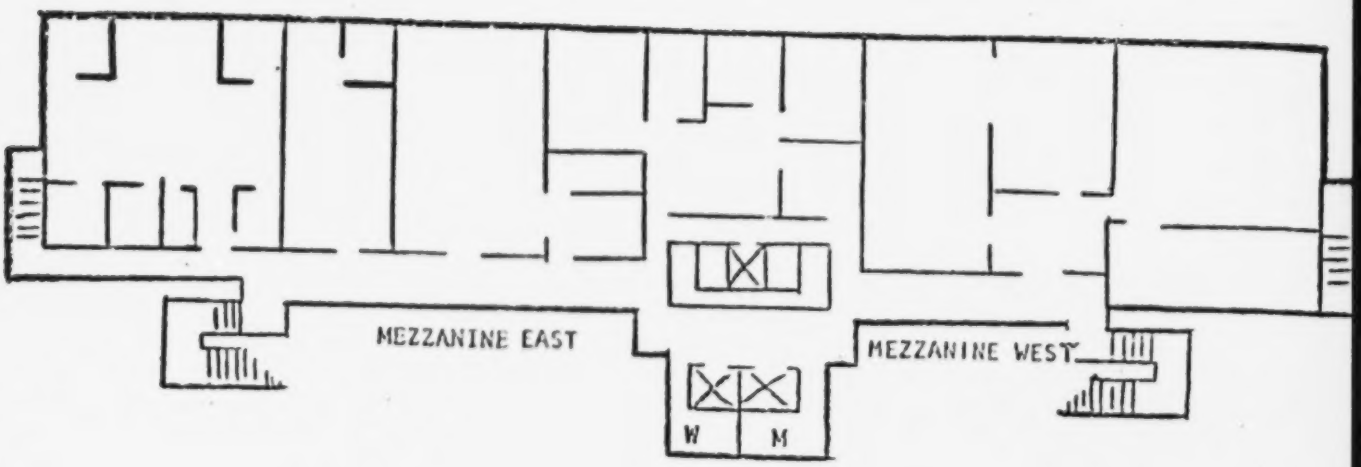
As a brief review, fill in the columns below, indicating for each location what floor it is on and whether it is on the East or West side of the building.

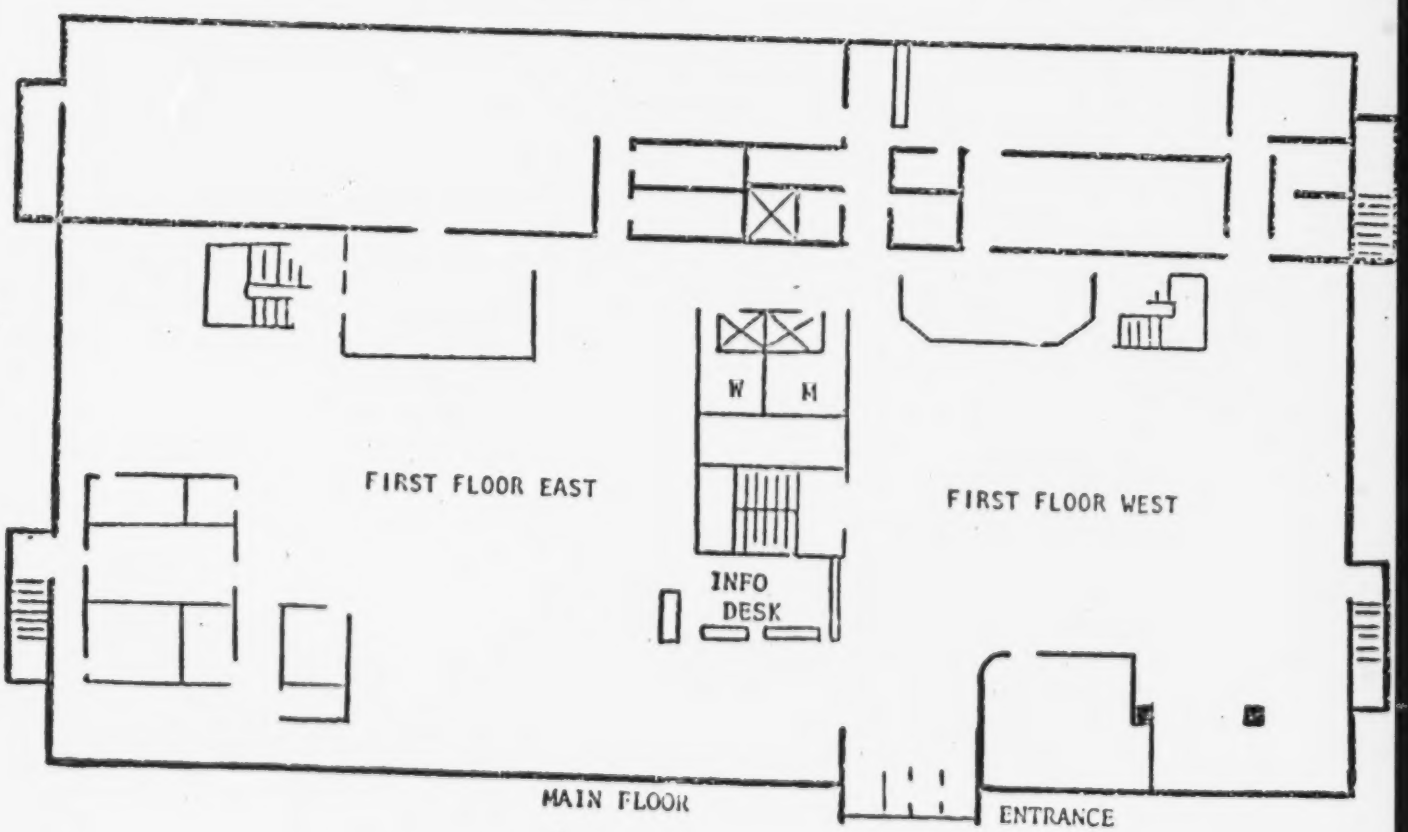
	Floor	E or W
Administrative Services Offices	_____	_____
Audio Room	_____	_____
B section of the stacks	_____	_____
H section of the stacks	_____	_____
Interlibrary Loan Office	_____	_____
L section of the stacks	_____	_____
Micromaterials	_____	_____
PQ section of the stacks	_____	_____
Rare Books	_____	_____
Stacks Supervisor's Office	_____	_____
Urban Archives	_____	_____
Z section of the stacks	_____	_____

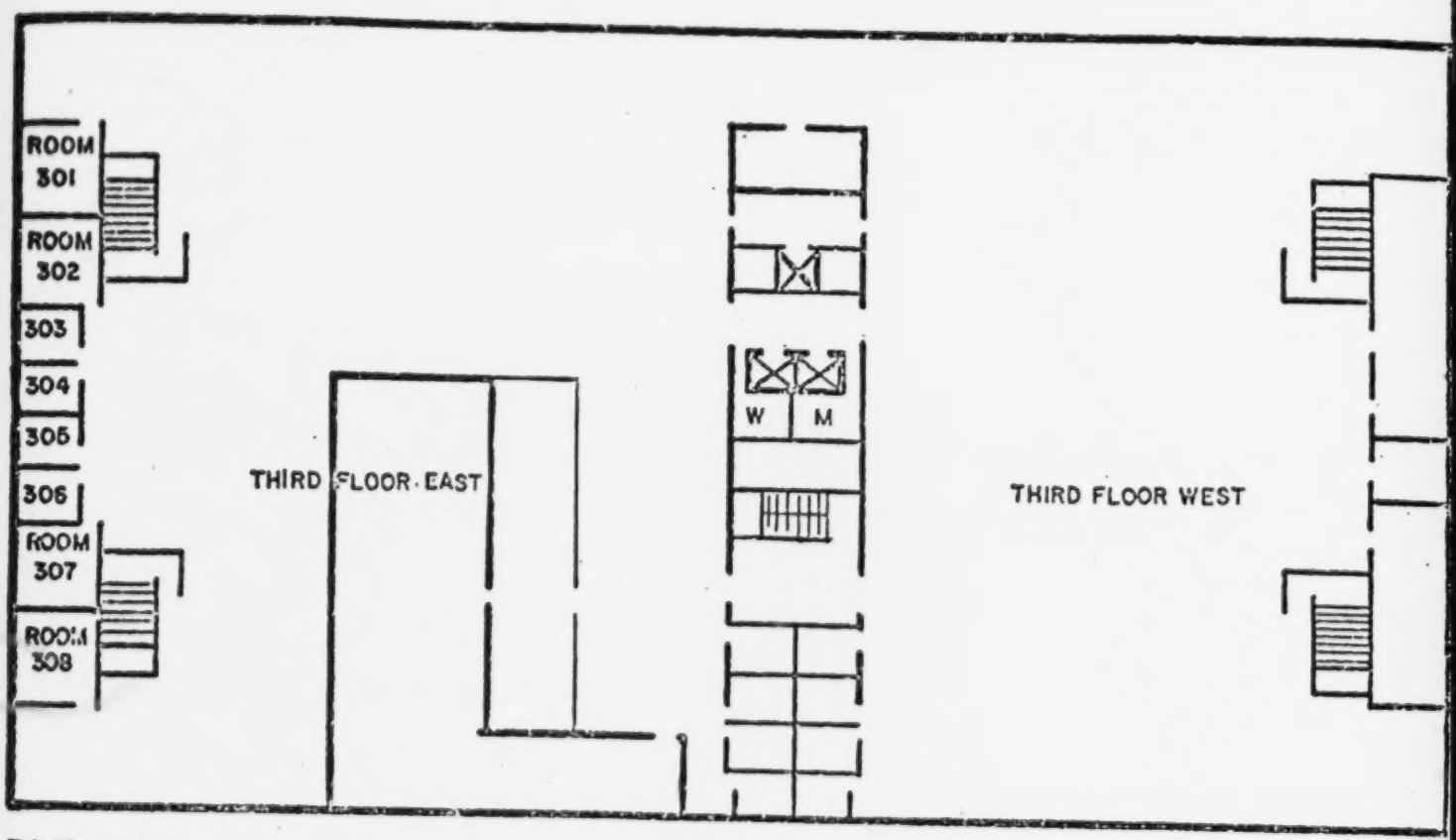


GROUND FLOOR

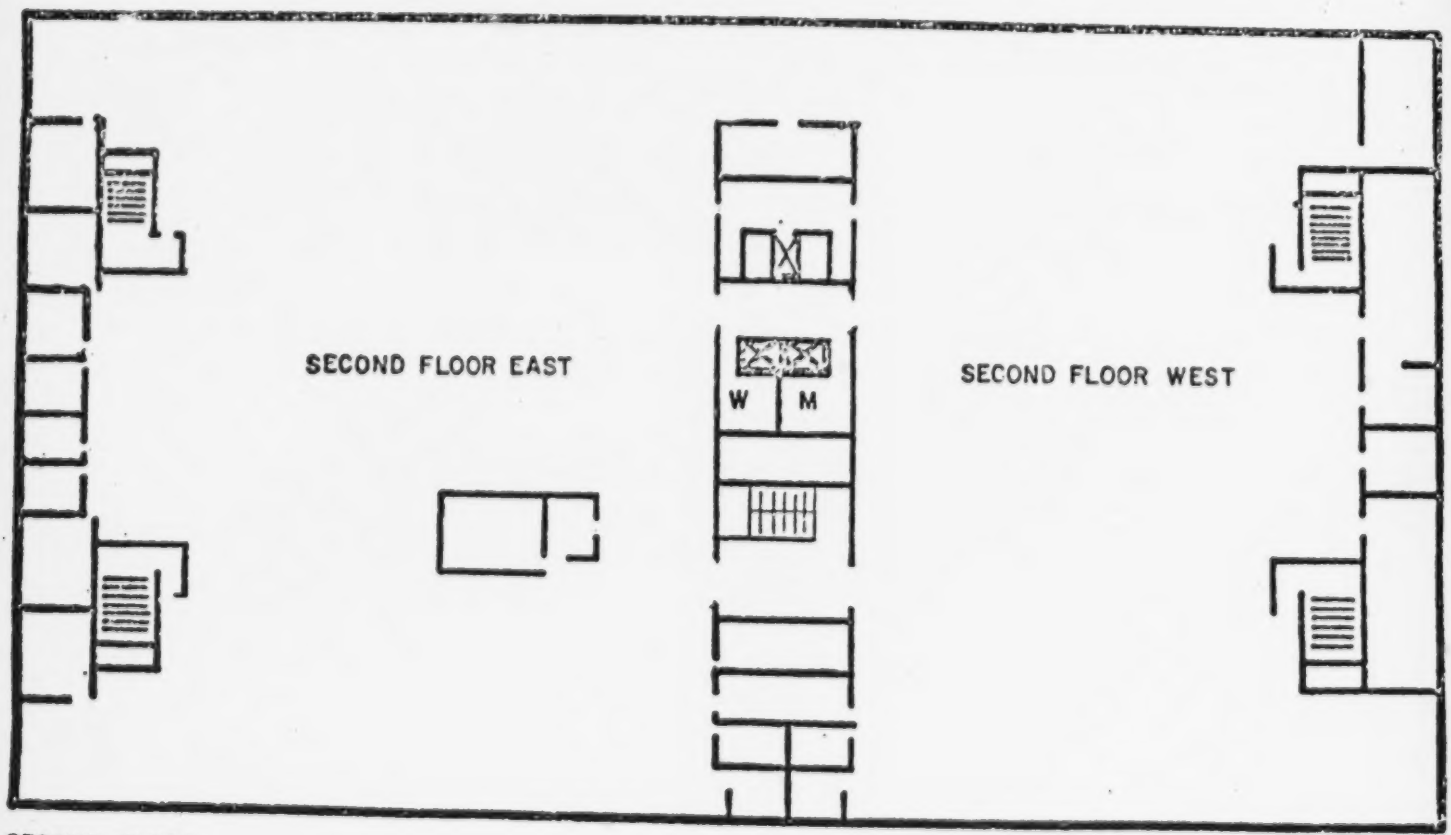
PALEY LIBRARY FLOOR PLANS







THIRD FLOOR



SECOND FLOOR

Central Library System, 02/88
Self-Paced Training for Staff
Exercise #2

TEMPLE UNIVERSITY CAMPUSES AND LIBRARIES

Objective: The objective of this exercise is to familiarize you with the sections of the CLS Services Manual that provide general information about campus locations, branch libraries, and departmental libraries, and a staff directory for the Central Library System (Paley, branch, and departmental libraries).

Most of the questions in this exercise can be answered by referring to the CLS Services Manual, Section I TEMPLE UNIVERSITY, Section II UNIVERSITY LIBRARIES, and Section III CENTRAL LIBRARY SYSTEM.

1. Using the Main Campus map in the CLS Services Manual, Section I TEMPLE UNIVERSITY, fill in the following blanks:

   Students can use public transportation to reach the Main Campus from Center City. They can come by train, using the SEPTA line, getting off at Temple U. station at _____ streets. or by the _____ bus, or subway. The nearest subway stop to the campus is _____. There is a "Visitor Parking" lot available on campus. Where is this located? _____ How many campuses does Temple have in the Delaware Valley area? _____

   The Student Activities Center is located at the corner of _____ and _____.

   The Conwell Copy Center, where duplicating is done, is in Conwell Hall, which is located at the corner of _____ and _____.

   Microcomputers for student use are available in the Computer Activity/Mathematics Building located on _____ St.

   The Blockson Afro-American Collection is in Sullivan Hall, located at _____ and _____.

   The College of Engineering, Computer Sciences, and Architecture Library is in the CECSA Building at the corner of _____ and _____.

   The Zahn IMC, containing education and social services administration collections, is on the first floor of Ritter Hall Annex, called Ritter Hall South on the map, at the corner of _____ and _____.

2. Using the list of building codes and locations in the same section, answer these questions:

   What building is BL? _____
   What do the following abbreviations stand for?
   AB _____
   AC _____
   AL _____

3. Using Section III CENTRAL LIBRARY SYSTEM and the Telephone Users Guide in Section VII APPENDICES of the CLS Services Manual, fill in the blanks:

   To call an Ambler extension, key in ____ before the 4-digit extension number.

   To place an outside call, key in _____ before the regular number.

   CALL PICKUP: To answer a call ringing on a nearby extension, lift the handset on your phone and depress _____.

   HOLD: To put a call on hold, depress switchhook and depress____ . To retrieve a call on hold, pick up the handset and depress _____ .

   TRANSFER-UNANNOUNCED: To transfer a call to another extension, depress the switchhook, depress _____, key in the extension number, and replace the handset.

4. Refer to the Ambler Campus map in Section I of the CLS Services Manual and answer the following:

   In addition to the Temple bus between Ambler and the Main Campus, there is also public transportation. The SEPTA Regional High Speed line--the Paoli-Doylestown line (R_____)--stops at the Ambler train station, and there is a free bus to the campus.

5. See the Tyler School of Art map and answer the following:

   There is a Temple bus between Tyler and the Main Campus. There is also a SEPTA bus connection. This bus line is _____
   In which building do you find the library?_____

6. Fill in the following blanks from the map of the Health Sciences Center:

   The Medical Library is in the Kresge Science Hall. This building is on the corner of _____ and _____.

   There is public transportation between the Main Campus and the Health Sciences Center; students can take the subway or the ___ bus.

The Dental-Allied Health-Pharmacy Library is on the corner of _____ and _____.

Refer to other maps and lists in Sections I and II of the Manual to answer the following questions:

7. The librarian in charge of the HPERD Library is _____ .

8. Access to the Law Library is _____ ; arrangements for access may be made through the Dean's Office of the Law School.

9. The Temple University Center City Campus consists of two Center City addresses: _____ and _____ .

Central Library System 02/88
Self-Paced Training for Staff
Exercise #3

USING GEAC

This exercise should be read at a GEAC terminal so that you can perform each operation as you read about it. Use one of the staff terminals.

The GEAC terminals at the various public service desks are primarily for staff use. They are kept on all the time. If you are the last person on desk duty for the day, dim the screen using the knob underneath the screen on the right. It also serves to vary the intensity of the printing on the screen.

You will sometimes see a message on the screen saying NO POLL. This means "the system is down." If something is seriously wrong, you may see nothing at all on the screen. The Administrative Services Department is responsible for telephoning all service points to inform them of the situation.

A. THE GEAC DATABASES

GEAC is the name of the computer system that contains records for the materials the library owns. GEAC's databases are partly made up of the Central Library System's RLIN computer tapes. RLIN is a database containing records of the holdings of the Research Libraries Group, of which Temple is a member. Our RLIN tapes on GEAC contain records for books Temple has cataloged from 1972 to the present. GEAC's database also contains records of older books that have been entered whenever someone has checked them out or staff members have added their records to the database. As of January 1988, about 500,000 titles were in the database. This is a little more than one-third of the titles in the library's shelflist. Most of the items cataloged by CLS since 1972 are included. In fact, in 1987 the library stopped filing cards in the card catalog, except for some special collections. Therefore, most items cataloged since 1987 can be found only in the online catalog.

GEAC's records do not always reflect changes in the ways books are cataloged, so when you search for a book by author or subject, look for alternative possibilities. For example:

real name: Samuel L. Clemens	pseudonym: Mark Twain
word spelled out: United States	word abbreviated: U.S.
older subject heading: Negro	newer one: Afro-American

GEAC will display different records for each of these approaches; your book may appear under one but not the other.

B. GEAC MODES AND MENUS

Our desk terminals display a System Menu (Terminal Control Program or TCP) when they are turned on which offers a choice between SNU, MRMS or BPS, GEM, CIR, and CAT (explained in Part C). At the System Menu, type your choice and press SEND.

SNU: SNU gives news about the system.

MRMS or BPS: MRMS stands for MARC (MAchine Readable Cataloging) Record Management System. The system is made up of the records of our holdings on RLIN computer tapes and OCLC tapes (another shared cataloging database), and the short records created by Access Services staff for items which are being charged out but are not on the tapes. The records in the online catalog come from MRMS. The name of the system will be changed in the near future to BPS: Bibliographic Processing System.

GEM: GEM is an electronic mail system which allows users to communicate with each other with messages which are sent and received at the GEAC terminals. A special account number is needed to use GEM.

CIR: CIR is the database used to register patrons and to keep track of library materials that have been checked out, to recall borrowed materials, and to monitor financial obligations of patrons.

C. USING THE ONLINE CATALOG

The online catalog is the mode that is available on all the public terminals. You may consult the Guide to Temple Libraries' Online Catalog, available at many terminals, for information on how to use the catalog.

To get to the online catalog from the System Menu (TCP), type CAT and press SEND. The introductory screen explains commands designed to help you use the online catalog. Following the directions at the bottom of the screen, press SEND to begin. Press SEND twice more and read the information. Then press SEND again. This CAT screen lists the types of searches you may choose.

NOTE: You need to press SEND after each command or search you enter while using GEAC in order to send a message to the computer and get a response.

Try the exercises below for practice insearching for books.

1. Title search: Following the directions at the bottom of the screen, type 1 or TIL. The title search screen asks you to enter, or type, a title.

Find a book called Words of Advice.

The resulting record is called the brief display - a specific record for an item giving author, title, publications information, location, call number, and circulation status.

What is the call number? _____

2. Author search: To find out what other books the author has written: Type CAT to return to the search choices. Type 2 or AUT. The author search screen asks you to enter an author's name. Type the name of the author of Words of Advice, last name first and then the first name.

The resulting screen is a citation display -- a list of titles matching your search request arranged alphabetically.

(a) List here one title of another book Fay Weldon has written.

_____

To find the location of this book and other information about it, type the number of the title you have chosen. The resulting record is the brief display.

(b) What is the call number of the title you chose? _____

In which CLS library is the book shelved? _____

What is the status? _____

3. Author-Title search: Return to the CAT screen and type 3 or A-T and press SEND.

The resulting screen asks you to enter an author's name. Type Tischler, Henry L.

The next screen asks for a title. Type INTRODUCTION TO SOCIOLOGY. There are many books called Introduction to Sociology. The author-title search allows you to find the one by a certain author.

(a) Where would you find this book? (Location and call no.):

_____

(b) To find more complete information about this book, type FUL and press SEND. What subject heading has been assigned to this book?

_____

4. Subject search: Find other books on sociology by doing a subject search. To do this, return to the CAT screen and type 4 or SUB and press SEND. Your search will result in an index display - an alphabetical list of subjects closest to the one you have entered.

(a) The top of the screen will tell you how many subjects in the catalog your request matches. Fill in the blank:
"Your subject: Sociology Matches at least ____ subjects."

(b) A maximum of 11 items is listed on the first screen. To see the next items in the list, type FOR to browse forward. What is the complete subject, including subheadings, listed first on the resulting screen? _____

(c) To return to the previous screen, press F4. Type 1 and press SEND to get a list of items cataloged under the first heading. The resulting screen is a citation display. To see an item in the list, type the number of the item you want and press SEND. The result is a brief display.

What is the location and call number of the book by Mark Abrahamson?

_____

(d) To see the next item in the citation display, type FOR. What is the location and call number of this item? _____

(e) Type CIT and press SEND to return to the citation display. Call up the brief record for the book by Albrecht, Reinhardt. Note that the screen is blank where the location, call number, and status should be given. This means that the book has not been linked: we have a record of the item in MRMS/BPS, but the location information has not yet been added. The card catalog would have to be used if you wanted to find the location of this item.

(f) Type IND and press SEND to return to the index display. Note the subheadings. What is the subheading you would use if you were looking for a book about the history of sociology in North Africa?

_____

5. Return to the CAT screen. A keyword search allows you to look for one word in a title, an author's name, or a subject. If you are not sure of the exact title, name, or subject, try a keyword search. Type 6 or KEY and SEND. The resulting screen offers a choice of title, author, or subject keyword search. Type 1 or TILK for a title keyword search. Type feminism to find all the items in the catalog which have the word feminism in the title. How many are there? _____

Now try another title keyword search. This time try truncation. Type feminis# instead of feminism. Replacing the last letters of the word with # - truncation - allows you to search for words which may end in a variety of ways. How many titles result? _____

6. Return to the CAT screen. Try a number search. Type 5 or NUM and SEND. The resulting screen allows you to search for a variety of numbers. Try searching for one of the call numbers you found in doing this exercise.

7. Now experiment with the remaining search choices. RES allows you to find out what is on reserve. PAT allows you to find out information about you as a patron: what books are charged out to you, what fines you owe, etc. You need your ID with a barcode to get patron information.

8. Experiment with any other searches you want to try.

APPENDIX E

FORTHCOMING! If It Weren't for the Patron: Evaluating Your Public Service Attitude

$130.00 approximately 20 minutes 0-8389-2081-0 1987

A 1987 update of Library Video Network's popular introduction to public services incorporates material on contemporary aspects of public service, such as computer-assisted reference. This "start-stop" tape allows discussion after each segment on how library service could have been better delivered before proceeding to another version of the segment showing improved performance. Basic communication skills and library service methods are emphasized.

Beyond Booktalking

$85.00 20 minutes 0-8389-2050-0 1980

Suggestions for entertaining and informative programs for the elderly, high school students, and parents with preschool children are demonstrated by librarians. The simulated programs use several methods to introduce a full range of library services to an audience.

Days Online

$130.00 14 minutes 0-8389-2052-7 1983

Effective and ineffective versions of using computers to meet patrons' needs in typical library service situations. This "start-stop" tape for public service staff permits the workshop leader to pause for discussion following a segment showing ineffective service, and then to proceed to the segment showing better service.

The Library Show: Merchandise It!

$130.00 19 minutes 0-8389-2057-8 1985

"...this program urges librarians to apply techniques already successfully utilized in bookstores to encourage browsing and impulse circulation in their libraries.... Further insight is offered by Que Bronson, author of a planned merchandising handbook, who recommends the techniques to demonstrate to patrons what their tax dollars have bought." *Booklist*

Volunteers Make the Difference

$130.00 17 minutes 0-8389-2065-9 1984

Basic recruitment, selection, supervision, and training techniques for a successful library volunteer program. Segments show volunteers in action, and the volunteers themselves relate their experiences. How the community, in addition to the library, can benefit from a volunteer program also is illustrated.

From Presenting ALA Video: Library Communication Tools for Today!
ALA Video/Library Video Network, Chicago (1987)

APPENDIX F

TASK FORCE ON PUBLIC SERVICE DESK TRAINING

The Task Force hopes to develop a manual that can be used in the training of staff members with public service desk assignments. Portions of this manual would contain profiles of CLS departments and their functions as they relate to public service activities.

Listed below are a few questions designed to help direct our thoughts as we attempt to outline the specifics of each section. If you can find a few minutes to think over each question and provide a response, it will be greatly appreciated. Any thoughts concerning this project that are not specifically addressed in these questions will also be welcomed. Please feel free to share this questionaire with your staff. Thank you.

What information about your department and its activities would you include in a manual used for public service desk training?

Do you have policies or procedures that have some inpact on public services and, therefore, should be respresented in a manual ? Please specify.

Does your department have or intend to develop fact sheets that describe its function, policies, or procedures? Please include copies.

Plans for the Manual include:

A. Departmental "Who's Who. This section would list staff indicating their functions, identifying what staff member has responsibility for particular problems. Please provide such a list.

B. Brief narrative of departmental functions. Please provide such a description or outline.

Attached is an outline of the propose manual. Your comments and/or suggestions are welcome.